

Health & Personal Care



May 2009 US\$395



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HEALTH & PERSONAL CARE

Supplier capability in China

EXECUTIVE SUMMARY

China's health and personal care industry is gearing up for a tough year. As consumers continue to tighten spending amid the uncertain economic climate, suppliers face the challenge of receiving fewer orders or being pressed for lower prices. Managing cash flow has also become more difficult, leading to the closure of several companies in the past few months.

Customs statistics confirm the softening in external demand. In January and February, exports declined 19 percent in terms of both volume and value compared with the same period in 2008.

To survive the economic downturn that is weakening external demand, suppliers are taking a number of steps aimed at attracting more orders and boosting long-term competitiveness.

The following are some of the key trends we see in the industry.

- At many companies, prices of existing designs will be reduced by as much as 10 percent to make these more affordable. In line with this effort, overhead and production expenses are being trimmed through measures such as streamlining and recycling.

- Still, a number of companies will be adjusting their quotes upward, as raw material costs are on the rise once again. For some, price cuts are not an option, since margins remain slim due to the adoption of manufacturing inputs compliant with safety and environmental requirements such as those of RoHS.

- Suppliers will emphasize the basics in upcoming designs. Models will be equipped with fewer add-ons, but they will be able to perform core functions on a par with existing products.

- At the same time, multifunction units will continue to increase, especially in the promotional segment. In the midrange and high end, releases capable of providing greater user comfort and convenience are expected. Additionally, for

measuring devices, accuracy and speed will improve.

- Suppliers will continue to solidify their foothold in the EU and North America, which currently account for more than 50 percent of export value. A number of companies will also explore market opportunities in the emerging economies of Eastern Europe, South America and the Middle East.

The report covers three major product lines of China's health and personal care industry, namely personal grooming appliances, health monitors and massagers. The categories are discussed separately, with the first segment divided further into hair-styling and removing tools.

For each line, details about the different types offered, their common features and the factors determining quality and price are provided. The latest trends in design, functions and materials are also discussed. Information on the supplier base and key sourcing centers can likewise be found in the sections.

The Industry Overview illustrates the effects of the global economic downturn on export sales and growth projections. It also identifies the strategies that are being employed at most companies to stimulate demand and boost revenue.

To reflect the industry structure, 84 percent of companies featured in this report are local, privately owned enterprises. The rest consists of suppliers with Hong Kong- and Taiwan-based investors.

The majority of enterprises are based in Guangdong and Zhejiang provinces. These two areas are the primary sources of health and personal care products from China, accounting for nearly 90 percent of the country's export volume. Their shipments generate three-fourths of total export sales.

In this report

- 25 in-depth company profiles
- 33 additional suppliers
- 90 top-selling export products
- Supplier demographics
- Supplier survey
- Industry statistics & charts

METHODOLOGY

To produce this report, Global Sources surveyed a wide range of suppliers. Rather than focus simply on high-profile makers, we compiled a representative sample of large, midsize and emerging manufacturers. All profiled companies are export-oriented professional suppliers that may or may not be clients of Global Sources.

The selection of suppliers is designed to reflect the composition of the industry in China in terms of geographic spread, business type and company ownership.

For each company profile, our research teams interviewed senior executives and export managers who discussed their recent performance and provided price, R&D, production and export forecasts for the next 12 months. The interviews were done in-person, by phone or e-mail.

In each case, companies were required to answer specific questions designed to verify their manufacturing and export credentials, including their production and export statistics, and a breakdown of exports by product type and market. Our production checklist details the product-specific manufacturing capabilities of each supplier.

All suppliers participated in a survey designed to provide insight into product and price trends, and challenges facing the industry in the next 12 months. All survey questions are single choice. Results were calculated based on the actual number of valid responses to each question.

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INDUSTRY OVERVIEW

Amid the uncertain market climate brought about by the financial turmoil, China suppliers of health and personal care products are implementing a variety of strategies to survive the tough year ahead. In the past few months, many saw revenue from overseas shipments decline 20 to 50 percent, causing about one-fifth of the industry to close down for lack of operating capital.

Customs statistics attest to softening external demand. In 2008, the total volume of hair-styling and removing devices, personal weighing machines, sphygmomanometers and massagers sent abroad fell 3 percent to just over 542 million units. Sales remained on a growth track, however, buoyed by the higher value of models sent overseas. Shipments during the period amounted to nearly \$3.4 billion, 15 percent higher than the aggregate value in 2008.

Figures for the first two months of 2009 show both export volume and value declining 19 percent compared with the same period last year. The former fell to 58 million units, while the latter slid to \$361 million.

Exports are expected to stay weak in the months ahead. Additionally, suppliers are anticipating greater price sensitivity among buyers, as consumers continue to keep a tight watch on spending due to economic uncertainty.

To stimulate demand and keep sales from declining, many companies are cutting their prices for existing designs, some by up to 10 percent. This remains a difficult task for many, since profits in the featured categories are generally still slim despite a downturn in raw material costs the past few months. Meeting international requirements such as the EU's RoHS also limits margins, because components that are certified compliant cost about 10 percent more than regular versions.

Keeping prices competitive will continue to be a major challenge in the months ahead, with quotes for plastic

and other manufacturing inputs once again on the rise. To minimize the effect of this on price and profitability, companies are reducing both overhead and production expenses. A number have already trimmed their workforce, and are now streamlining operations, minimizing wastage and recycling. Others are purchasing in bulk to gain economies of scale.

Back to basics

As regards product development, suppliers are going back to basics in their attempts to stimulate overseas demand. At many factories, R&D efforts are veering away from multifunction designs, which were the trend in previous years.

Instead, companies are releasing models with fewer add-ons but which perform core functions on a par with regular units. Designs introduced as items in a series are differentiated by minor low-cost adjustments in their appearance, which do not add significantly to price, if at all.

For most enterprises, about 50

Supplier summary

Suppliers surveyed	25
Export sales	\$326.3mn
Export ratio	80%
OEM business	61%
Capacity utilized	68%
Annual R&D spending	\$25.5mn
Full-time employees	23,635

Data: All surveyed suppliers

percent of export revenue now comes from entry-level devices that are 20 to 30 percent less expensive than other models. Suppliers have found these easier to sell, since buyers and end-users are more price-conscious these days.

To boost sales further, several midsize and large companies are also expanding their selections for the midrange and high end. For a number of these enterprises, the current business climate provides them an opportunity to increase market share by stepping into the gap left by makers that have closed down.

Back-to-basics is the prevailing theme in the midrange and high end as well. For cost-efficiency, many

Major customers

Company	
Best Way	Tesco, Argos (UK); Muster & Dickson (Italy); Palsom (Spain); MPM (Poland); CBI (Brazil)
Care	Brookstone (US); GiFi (France); Woolworths (Australia)
Dongguan Taishin	HoMedics (South America, Australia)
Henan Hanwei	CDP (Spain); Q3 (US)
Huaxin Yuanda	Breath-tester (Canada)
Ningbo Bright	Lanaform (Belgium); Webface (Taiwan)
Ningbo Riwei	Trisa (Switzerland); AFK, Carrera (Germany); Termozeta (Italy)
Shenzhen Guangkehua	Lidl (Germany); Wal-Mart, E&B Giftware (US)
Sinomax	Wal-Mart, Target, Sam's Club (US)
Wenzhou Lichang	Huiye (Taiwan); Interspor, Medipor (Turkey)
Xiamen Comfort	Wal-Mart (US)
Xiamen Health	Wal-Mart, Kmart (US)
Zhongshan Transtek	Leifheit (Germany); HoMedics (US)

Anionte Electric (Wenzhou) Co. Ltd

Established in 1997, Anionte is an ISO 9001-certified manufacturer specializing in health and personal care products. Its selection consists of massagers, health monitors and personal grooming appliances.

The company operates two factories in Wenzhou, Zhejiang province. Occupying a total of 7,000sqm, the plants are equipped with machines for mold making, plastic injection, cutting, bending, punching and PCB assembly. Voltage and current-leakage testers are also installed in the two facilities.

In 2008, Anionte produced about 500,000 units monthly, all of which were sent overseas. Revenue from exports reached \$23 million, with OEM orders making up 90 percent of shipments. Products went to North America, Europe, the Asia-Pacific region, South America and the Middle East.

In coming months, Anionte will be developing models that can provide greater user safety and comfort. Additionally, the company will improve its operating efficiency to become more competitive.

Company facts

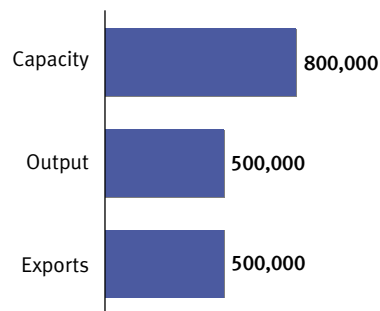
Year established	1997
Business type	Manufacturer
Company ownership	Mainland China-owned
Head office location	Wenzhou (Zhejiang)
Number of factories	2
Factory location(s)	Wenzhou (Zhejiang)
Total factory area	7,000sqm
No. of full-time employees	150
No. of R&D/design staff	10
No. of QC staff	20
Annual sales (all products)	\$23.0mn
Annual R&D spending	\$100,000
ISO certification	Yes

Sales & output: Health & personal care

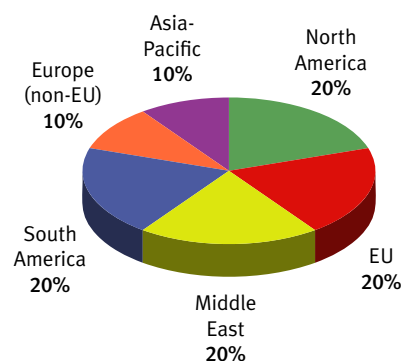
Annual sales	\$23.0mn
Share of total sales	100%
Annual export sales	\$23.0mn
Total monthly capacity	800,000 units
Average monthly output	500,000 units
Capacity utilized	63%
Average monthly exports	500,000 units
Export ratio	100%
OEM % of exports	90%
ODM % of exports	9%
OBM % of exports	1%

Profile

Production units/mth



Export markets



Contact details

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Capability

Production checklist

Makes molds in-house	Yes
Makes motors in-house	No
Makes sensors in-house	No
In-house PCB assembly	Yes
Plastic-injection machines	4
Cutting machines	2
Bending & punching machines	7
Sewing machines	—
Voltage testers	2
Current-leakage testers	2

Exports by product

Massagers	20%
Health monitors	10%
Personal grooming appliances	70%

Exports by market

North America	20%
European Union	20%
Europe (non-EU)	10%
Asia-Pacific	10%
Middle East	20%
South America	20%

Survey

- **Export prices**
Stay the same
- **Export sales**
Decrease
- **Target market**
South America
- **Capital expenditure**
Increase up to 50%
- **Major challenge**
Price competition
- **Export capability**
Improve operating efficiency
- **R&D focus**
Enhanced user safety & comfort

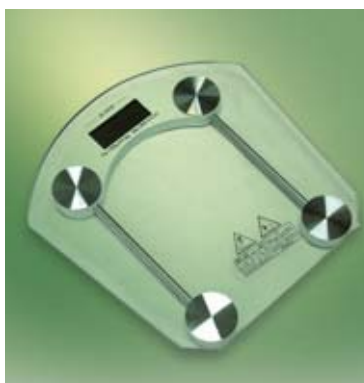
Popular export models



Massager

Model	AH8417
Minimum order	2,000 units
Packaging type	Paper box
Delivery time	30 days
Indicated price	•

Description: Handheld massager; ABS housing; three massage heads; runs on three AAA batteries; CE



Health monitor

Model	AH1034
Minimum order	2,000 units
Packaging type	Paper box
Delivery time	30 days
Indicated price:	•

Description: Bathroom scale; glass platform; LCD screen; high-precision strain gauge sensor; 150kg or 330-pound weighing capacity; 0.1kg or 0.2-pound increments; CE



Personal grooming appliance

Model	AT610C
Minimum order	2,000 units
Packaging type	Paper box
Delivery time	30 days
Indicated price	•

Description: Hair straightener; tourmaline-, titanium- or ceramic-coated plates; 3 to 5-minute heat-up time; 140 to 200 C temperature range; 35W rated power; in red, pink, purple or blue; CE, GS

• Information not disclosed

PRODUCT GALLERY

Personal grooming appliances



Anionte
(profile page 36)
Model: AT100
Minimum order: 2,000 units
Packaging type: Paper box
Delivery time: 30 days
Indicated price: •
Description: Hair dryer; AC motor; two speed and four temperature settings; removable filter; 1,800 to 2,000W; CE



Anionte
(profile page 36)
Model: AT610C
Minimum order: 2,000 units
Packaging type: Paper box
Delivery time: 30 days
Indicated price: •
Description: Hair straightener; tourmaline-, titanium- or ceramic-coated plates; 3 to 5-minute heat-up time; 140 to 200 C temperature range; 35W; in red, pink, purple or blue; CE, GS



Best Way
(profile page 38)
Model: BWB618
Minimum order: 3,000 units
Packaging type: Gift box
Delivery time: 30 to 45 days
Indicated price: \$7.56
Description: Hair straightener; ABS housing; anodized, or ceramic-, tourmaline- or nanosilver-coated plates; PTC heating element; five temperature settings from 140 to 200 C; reaches 220 C within 3 minutes; 360-degree swivel cord; CE, RoHS



Best Way
(profile page 38)
Model: BWC310S
Minimum order: 3,000 units
Packaging type: Gift box
Delivery time: 30 to 45 days
Indicated price: \$7.40
Description: Hair dryer; AC motor; two speed and two temperature settings; ionic function; removable filter; 1,800W rated power; CE, RoHS



Ningbo Intl
(profile page 52)
Model: DH-B8512
Minimum order: 1,000 units
Packaging type: Paper box
Delivery time: 25 days
Indicated price: •
Description: Hair straightener; ABS housing; 90x44mm plate, ceramic/tourmaline or 100% solid ceramic; adjustable temperature control up 210 C; 50W rated power; 110 to 240VAC, 50/60Hz rated voltage; CE, RoHS



Ningbo Riwei
(profile page 54)
Model: RW718
Minimum order: 3,000 units
Packaging type: Carton
Delivery time: 45 days
Indicated price: \$3.82
Description: Hair dryer; ABS housing; 1,400W rated power; CE, GS, RoHS

• Information not disclosed

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